

89-0026

LNAME Sherrill
SALUT Ms.
TITLE

FNAME MI Ruby C.
AUTH RA
RECNO 2207

PHNO 404 679-1678 EXT
FAXNO 404 679-1675 EMAIL
CONFID

ORG

AGENPREFIX Department of
AGENDESC Technical and Adult Education
DIVISION Office of Technical Education
PO_BLDG 1800 Century Place, Suite 400
STREET
CITY Atlanta
ZIP 30345-4304
COUNTY Fulton

ACRONYM DTAE
AGCODE 0415
DIVCODE

STATE GA
DELIVERY M
INST SA

TRANDATE 04/25/96

INIT PES

NOTE 4-25-96: She coordinates JTPA for local schools. She will send us the GDoL Manual which sets 3 year after grant period requirement. She thinks a common for local schools is a good idea.

Told her we would transfer 89-026,027,028 to DTAE; would do same for any others if we knew which they were.



Secretary of State
Department of Archives and History
330 Capitol Avenue, S.E.
Atlanta, Georgia 30334

Lewis A. Massey
SECRETARY OF STATE
(404) 656-2881

Edward Meldon
DIRECTOR
(404) 656-2358
INFORMATION (404) 656-2393
FAX (404) 657-8427

April 25, 1996

Ruby C. Sherrill
Office of Technical Education
Department of Technical and Adult Education
1800 Century Place, Suite 400
Atlanta, GA 30345-4304

Dear Ms. Sherrill:

Thanks for the JTPA information you shared with me this morning.

Enclosed are copies of the JTPA retention schedules from Department of Education:

- Schedule #89-026 - JTPA Unit Administrative Files, 1983 and [ongoing];
- Schedule #89-027 - SDA Cooperative Agreement RFP Files, 1983 and [ongoing].
- Schedule #89-028 - JTPA Section 123 Activity Files, 1983 and [ongoing].

We will update our records to transfer these to the jurisdiction of the Department of Technical and Adult Education. We will also begin a review to see if there are other records series that should be transferred from Education to DT&AE.

We will begin development of a common retention schedule for the local school systems' JTPA records when we receive the Department of Labor manual. We probably will be calling you again for clarification and additional information.

Again, thanks. Call us if we can be of assistance.

Sincerely,

Peter E. Schinkel
Head, Schedule Section
404 656-2373 FAX 404 656-2949
<petes@archives.sos.state.ga.us>

Enclosures

cc: Andrew S. Taylor, Assistant Director

C:\A1\0415-96.LTR

RETENTION SCHEDULES TRANSFERRED FROM DEPT. OF EDUCATION (0414)
TO THE DEPT. OF TECHNICAL AND ADULT EDUCATION;
ON NOTIFICATION OF RUBY C. SHERRILL, DTAE (SEE ATTACHED LETTER & NAMES ENTRY)

0415-000

81-0255 M Administrative Subject
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY
Hold in CFA 1 year
Transfer to SRC
Hold 2 years
Destroy
↑

0415-000

81-0256 M School System
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY
Hold in CFA 1 year
Transfer to SRC
Hold 2 years
Destroy

0415-000

81-0325 M Trade and Industrial Education School System File
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

0415-000

89-0026 M JTPA Unit Administrative Files
C 960425 SA I
4/25/96 Trans. from 04140(DOE) to 0415(DTAE)

0415-000

89-0027 M SDA Cooperative Agreement/RFP(Request for Proposal) Files
C 960425 SA I
4/25/96 Trans. from 0414(DOE) to 0415(DTAE)

0415-000

89-0028 M JTPA Section 123 Activity Files
C 960425 SA I
4/25/96 Trans. from 0414(DOE) to 0415(DTAE)

Entered by: Charles D. Balm Jr Approved by: [Signature]

Date: Nov. 18, 1996Nov. 18, 1996

C:\A1\SCH\APPROVED\0415-96.sch

RETENTION SCHEDULES TRANSFERRED FROM DEPT. OF EDUCATION (0414)
TO THE DEPT. OF TECHNICAL AND ADULT EDUCATION;
ON NOTIFICATION OF RUBY C. SHERRILL, DTAE (SEE ATTACHED LETTER & NAMES ENTRY)

0415-000

81-0014 M Vocational Organizations Affiliation Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = CY

Review folder and destroy all material 3 years or older
Note* Earlier Destruction authorized

0415-000

81-0015 M Vocational Organization General Administrative Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY

Hold in CFA 1 year
Transfer to Archives
For continuing retention

0415-000

81-0016 M Vocational Organization Financial Files
C 960425 SA C
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

CO = FY

Hold in CFA 1 year
Transfer to SRC
Hold 4 years
Destroy

0415-000

81-0043 M Related Coordinators
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)

0415-000

81-0168 M Business Education School
C 960425 SA I
4/25/96 Tran. from 0414(DOE) to 0415(DTAE)



APPLICATION FOR RECORDS RETENTION SCHEDULE

OFFICE OF THE SECRETARY OF STATE
DEPARTMENT OF ARCHIVES AND HISTORY
RECORDS MANAGEMENT DIVISION

INSTRUCTIONS: See Publication No. 76-RM-1 for instructions on completing this form. Forward signed original to Department of Archives and History, Records Management Division, 330 Capitol Avenue, Atlanta, Georgia, 30334, Attention: Scheduling Section.

881028-11

FOR AGENCY USE		1. Agency Address	FOR RECORDS MANAGEMENT USE	
Application Date		Georgia Department of Education Office of Instructional Services Div. of Secondary Vocational Instruction JTPA Unit - 1762 Twin Towers - East Atlanta, GA 30334	Application Number	89-026
Application Number			Date Received	Date Completed
			OCT 28 1988	MAY 22 1989
2. Person to Contact		Working Title	Telephone Number	
Carl E. McLeskey		Coordinator, JTPA Programs	656-2521	
3. Action Requested				
a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate.				
b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated.				
c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void				
4. Dates of Series		5. Records Series Title (followed by title used in office; if different)		
Earliest	Latest			
1983	To Date	JTPA Unit Administrative Files		
6. Division and Office Function What is the function of the Division and the Office in which this record series is created?				
The JTPA Unit (Job Training Partnership Act) of the Division of Secondary Vocational Instruction administers Section 123 of JTPA. Section 123 of JTPA allows 8% of the JTPA Title II-A funds received by the State to be used to provide coordination between the Department of Education, JTPA Service Delivery Areas (SDAs) and local educational agencies; and to fund projects providing training to JTPA eligible participants. The JTPA Unit, through Cooperative Agreements with each SDA issues, RFP's, approves projects, monitors projects, processes requisitions for reimbursement, and coordinates activities with the Job Training Division, GDOL, and Service Delivery Areas.				
7. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file.				
Documents relating to: Administering the activities of the JTPA program in Georgia.				
Included are: Copies of expense statements and itineraries, budget information, grant notices, correspondence, memorandums and other documents relating to JTPA; printing request; telephone logs; office personnel files; mailing lists; leave reports; conference data; copies of annual plans, activity reports; reference copies of reports and regulations of interest to the Unit; and related correspondence and memoranda.				
File is arranged: Chronologically by fiscal year, thereunder alphabetically.				
8. Monthly Reference Rate How often are records referred to which are:				
One to six months old <u>20</u> ; Seven to twelve months old <u>10</u> ; Thirteen to twenty-four months old <u>5</u> ;				
twenty-five months and older <u>1</u> ?				
9. Annual Rate of Accumulation of Records				
Letter-size drawers _____; Legal-size drawers _____; Shelves _____; Other (specify) <u>4 cu. ft.</u>				

YES	NO	10. Questionnaire (Place an 'X' in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
	X	d. Does this series have historical or long term research value?
	N/A	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
	X	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	X	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

11. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|----------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | _____ years. |
| c. Federal law | _____ years. | f. Federal retention instructions | 3 _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

Federal Register. Vol. 48, No.51/Tuesday 3/15/83 - pg. 11082 - Sec. 629.35(e) (Attached).

Records are required to verify compliance with Sec. 123, JTPA and State Plan.

12. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☒ Other Program Year * then,
(July 1 - June 30)

- ☒ Hold in the current files area _____ month(s) 1 year(s); then
- ☐ Transfer to local holding area; hold _____ year(s); then
- ☒ Transfer to State Records Center; hold 3 year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

*Unless any litigation or audit is begun or a claim is instituted involving the grant, at which case records would need to be held until final resolution is complete and then destroyed.

These instructions apply to all prior and future accumulations of the series.

*JTPA Program Year lags 1 yr. behind State FY (ie: Program Year 1983 = Fiscal Year 1984).

Agency Head/Designee (Signature)	Date	Records Management Officer (Signature)	Date
<i>Billy J. F...</i>	10/25/88	<i>Yickie Baker</i>	10/25/88
Recommendations in paragraph 12 are approved. (If disapproved, attach letter of explanation.)		State Records Committee (Signature)	
89-026		State Auditor/Designee	<i>W. H. Lewis</i> 5-22-89
		Secretary of State/Designee	<i>Edward Weldon</i> 5/16/89
		Governor/Designee	<i>W. H. Rogers</i> 5/17/89
		Attorney General/Designee	